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Fishery Products

EU Fishery Marketing Report

2008

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Report Highlights:

The EU depends more than ever on imports from third countries to meet its fish demand. Import volumes increased by a quarter over the past 5 years and almost all product groups benefitted from this trend.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
The Hague [NL1]
[NL]

Executive Summary

The volume of fish, the sum of fish catches and aquaculture generated by the individual EU Member States, is estimated to be 6.6 million MT for 2007, with Spain, Denmark, France, the UK and the Netherlands as the leading countries. Fish catches contribute almost 80% to the total EU volume, and aquaculture accounts for the remaining, or 1.3 million MT. The consumption of fish in the EU is estimated to be around 10 million MT and demand is expected to continue to go up.

The EU is a net importer of fish products and the trade deficit continues to grow. The EU depends more than ever on imports to meet its fish demand. EU import volumes from third countries increased by a quarter over the past 5 years. Norway remains the largest supplier of fish. China has become the second largest supplier. The third and fourth largest suppliers are the U.S. and Iceland, respectively. The most important product group, in terms of volume, the EU imports from third countries is frozen fish fillets, mainly Alaska pollack, pangasius and cod. The second and third largest product groups are frozen shrimp and prawns and tuna and skipjack, respectively.

The U.S. is the third largest supplier of fish to the EU. U.S. export volumes grew by almost 20% over the past 5 years. In terms of value, exports doubled to over 1 billion dollars. Roughly half of U.S. fish export is Alaska pollack. Cod and surimi together represent another 20% of U.S. exports to the EU.

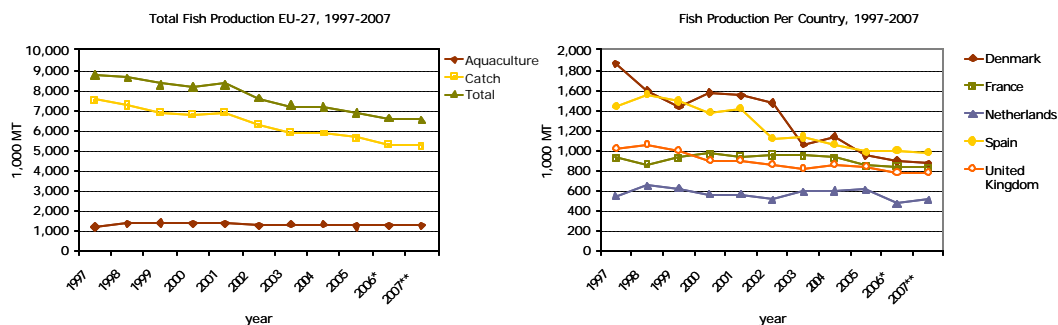
Growth markets within the EU continue to be frozen fillets of e.g. Alaska pollack, cod, pangasius, monkfish and haddock. Imports of halibut, mollusks, scallops, lobsters, Sockeye salmon, anchovies and dried fish have also gone up considerably, although these products represent a smaller market within the EU. Finally, demand gradually increased for prepared and preserved fish like surimi, shrimp, prawns, caviar and caviar substitutes.

This report is the result of collaboration with other FAS colleagues. We recommend that the report is read in conjunction with the EU Fisheries Policy Report, written by the US Mission to the EU in Brussels, Belgium – Gain Report Number E48029. This report can be downloaded from <http://www.fas.usda.gov/scripts/attacherep/default.asp>.

I. Fish Catches and Aquaculture

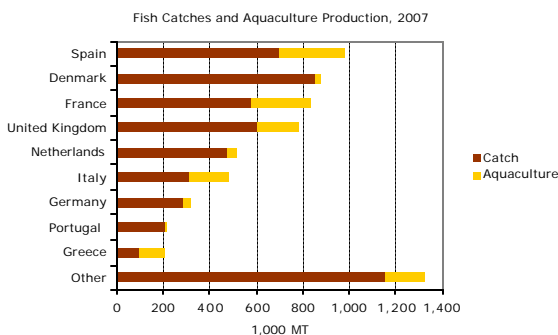
The volume of fish, the sum of fish catches and aquaculture generated by the individual EU Member States, is estimated to be 6.6 million MT for 2007. Over the past decade, the volume went down by roughly a quarter, mainly due to decreasing catch limits¹.

Within the EU, the top 5 largest generators of fish continue to be Spain, Denmark, France, the UK and the Netherlands. They together represent an estimated 60% of the generated volume, although their market share is slightly decreasing, especially for Denmark and Spain.



Source: Eurostat, * preliminary figures, ** FAS/The Hague estimates

Fish catches contribute almost 80% to the total EU fish volume. The five main fish species, in volume, are Atlantic herring, European sprat, blue whiting, sandeels and Atlantic mackerel. The North-East Atlantic fishing region continues to be the main region for catching fish. As the stock for many fish species is below the safe biological limits, catch limits are put in place. Further development of the Common Fisheries Policy will determine future fish catches by EU member states.



The contribution of aquaculture has grown slowly to around 1.3 million MT, or over 20% of total EU seafood volume². The aquaculture sector can be split up into the fin fish sector (trout, salmon, carp, sea bream, etc.) and shell fish sector (mussel, oyster, etc.), with equal volume figures. Industry contacts indicate that the production of fin fish, especially sea bream, sea bass, cod and northern blue fin tuna, will continue to grow. Growth will mainly come from the Mediterranean countries (sea bream and sea bass). EU

shell fish production is expected to remain stable. Future aquaculture production will heavily depend on new aquaculture production sites and licenses, fish feed prices, environmental issues and the development of technology.

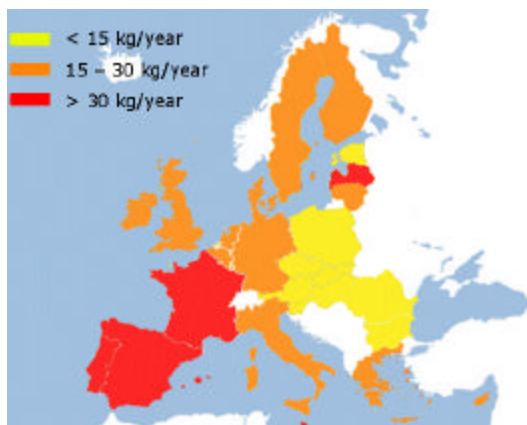
¹ EU Common Fisheries Policy's (CFP) Total Allowable Catches (TACs) are described in GAIN report E48029

² Appendix 2

II. Consumption

EU pelagic fish (e.g. herring and mackerel), which is considered to be a lower value fish, is not only consumed in Europe but large volumes are also exported to several countries in Africa. The lower value demersal fish species (e.g. Alaska pollock) are very popular by food processing companies that target the mainstream retail market. The higher value demersal fish species (e.g. sole) are traditionally used by restaurants and can increasingly also be seen as a component in ready-to-cook meals in upscale retail markets.

The combined population of all 27 member countries has been estimated at almost 500 million. Appendix 3 shows that the average per capita consumption of fish in the EU is around 22 kg per year³ which results in a total consumption within the EU of almost 11 million MT.



There are huge differences between the various MS. The lowest per capita consumption of fish, up to 15 kg per year, can be found in the Central and Eastern European Member States. The North West European Member States show average consumption figures between 15 and 30 kg of fish per year whereas people in Southern European countries eat more fish. In Portugal and Spain, the per capita consumption of fish is 60 and 40 kg per year, respectively.

Demand for fish in the EU is expected to continue to go up. The most important drivers are considered to be the predominance of large food retail chains, which result in greater availability of various seafood products, and growing demand by consumers for healthy and safe animal protein products, since fish has a healthy image. Finally the slightly growing EU population and the improvement of economic conditions in some new EU Member States add to a growing demand.

III. Trade

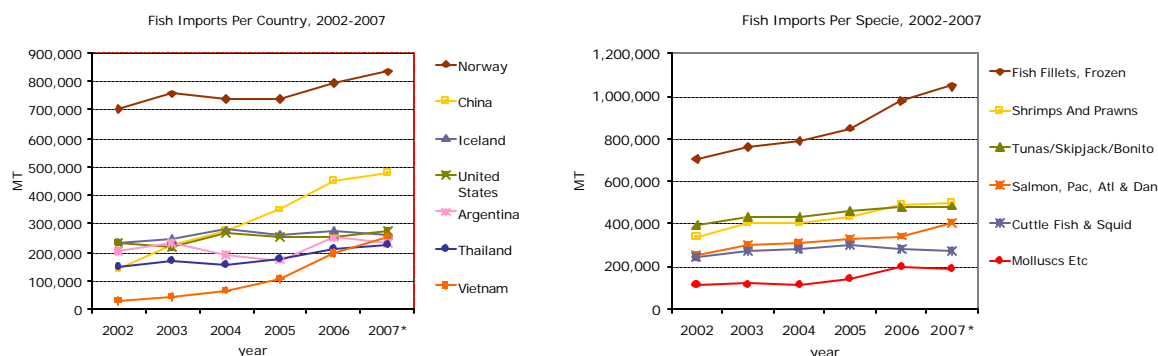
The EU is a net importer of fish products. Between 2002 and 2007, the EU's trade deficit grew by roughly a third in volume, from 2.5 million to 3.5 million MT. The EU depends more than ever on imports to meet its fish demand.

The 27 EU Member States imported last year an estimated 8.9 million MT of fish. Spain, France, Italy, Germany and the Netherlands were the largest importers. Over 5.0 million MT were imports from third countries, the remaining being intra EU trade. EU import volumes from third countries increased by a quarter over the past 5 years⁴. Neighboring Norway remains the largest supplier of fish with an estimated market share for 2007 of 9.4% (of total EU imports, including intra EU). China has become the second largest supplier with exports that more than tripled over the past 5 years. Individual import market shares of other main suppliers like the U.S., Iceland, Argentina and Thailand have been stable at around 3%. Exports from Vietnam grew enormously from 32,000 MT in 2002 to an estimated 256,000 MT in 2007, and Vietnam is now the fifth largest supplier of fish to the EU. Ecuador and Peru were able to double their market share over the

³ Appendix 3

⁴ Appendix 4

same period. The once leading suppliers Russia and the Faroe Islands were not able to benefit from the EU's growing deficit. In terms of value the increase of EU fish imports grew at a much faster pace, due to rising seafood prices⁵. Average import prices grew by 50% over the past 5 years.



Source: Global Trade Atlas, *FAS/The Hague

The most important product group, in terms of volume, the EU imports from third countries is frozen fish fillets, mainly Alaska pollack, pangasius and cod⁶. Main suppliers include China, Vietnam and the U.S. EU imports of pangasius from Vietnam grew enormously, making Vietnam the second largest supplier of frozen fish fillets to the EU. China and the U.S. continue to be the leading suppliers of Alaska pollack while the majority of cod comes from China, Iceland, Russia and Norway.

The second largest product group is frozen shrimp and prawns, with Greenland, Ecuador, India, China, Brazil and Argentina as the main supplying countries. Ecuador, Thailand and Seychelles are the leading supplying countries of the third largest product group, prepared and preserved tuna and skipjack. Norway continues to be the main supplier by far of farmed salmon, the fourth largest product group. Finally, squid and cuttlefish are supplied by India, Falkland Islands, Thailand, China and Morocco.

IV. Opportunities

The U.S. is the third largest supplier of fish to the EU. U.S. export volumes grew by almost 20% over the past 5 years⁷. In terms of value, exports doubled to over 1 billion dollars. Roughly half of U.S. fish exports is Alaska pollack. Cod and surimi together represent another 20% of U.S. exports to the EU. Other noteworthy products include hake, mackerel, salmon, cuttlefish, squid, lobster and scallops.

EU imports of almost all fish species continue to grow as a result of growing demand and declining EU production. Within the big bulk of frozen fish fillets, imports of Alaska pollack, cod, pangasius, monkfish and haddock have demonstrated the strongest growth.

EU imports of shrimp, prawns and farmed salmon grow annually by approximately 10%. Imports of halibut, mollusks, scallops, lobsters, Sockeye salmon, anchovies and dried fish have also gone up, although these products represent a smaller market within the EU. Finally, EU demand for prepared and preserved fish like surimi, shrimp, prawns, caviar and caviar substitutes gradually increased.

⁵ Appendix 5

⁶ Appendix 6

⁷ Appendix 7

V. Marketing

Seafood tradeshow

Participating at seafood tradeshow has demonstrated itself to be an effective tool in U.S. companies' desire to expand their international business. The following tradeshow are considered the most important international seafood trade shows attracting international buyers.

- The International Boston Seafood Show
Boston Convention and Exhibition Center,
Boston, Massachusetts, U.S.A.
www.bostonseafood.com

The International Boston Seafood Show, which is held in Boston, attracts not only domestic buyers but also overseas' buyers through, among others, the Buyers Mission, organized by the U.S. seafood cooperators.

- European Seafood Exposition (ESE)
Parc Des Expositions,
Brussels, Belgium
www.euroseafood.com

The largest international seafood tradeshow is ESE, annually held in Belgium. This show is endorsed by the USDA's Foreign Agricultural Service, which means that FAS/Washington works with the show organizer to create a U.S. pavilion. The seafood cooperators, listed below, are represented at ESE. Please go the following website for a complete overview of all USDA endorsed tradeshow,
http://www.fas.usda.gov/agx/trade_events/Tradeshowcalendar2008_2009.pdf.

U.S. Seafood Cooperators represented at ESE 2008

Alaska Seafood Marketing Institute (ASMI)
311 N. Franklin Street
Suite 200
Juneau, Alaska 99801-1147, USA
Phone: (800) 478-2903
Phone: (907) 465-5560
Fax: (907) 465-5572
Info@AlaskaSeafood.org
www.alaskaseafood.org

Food Export USA - Seafood Program Office
Colleen Coyne
Seafood Program Coordinator
25 Fairway Circle
Hope Valley, Rhode Island 02832, USA
Phone: (401) 491-9017
Fax: (401) 491-4104
c coyne@foodexportusa.org
www.foodexportusa.org

Southern U.S. Trade Association (SUSTA)
2 Canal Street Suite 2515
New Orleans, Louisiana 70130, USA
Phone: (504) 568-5986
Fax: (504) 568-6010
susta@susta.org
www.susta.org

Western U.S. Agricultural Trade Association (WUSATA)
4601 NE 77th Ave., Suite 120
Vancouver, Washington, USA 98662
Phone: (360) 693-3373
Fax: (360) 693-3464
www.wusata.org

More specific marketing information on Member State level can be obtained by contacting the individual FAS offices with the EU. They are also in a better position to provide you with listings of fishery products importers. Their contact details can be found at
http://www.fas.usda.gov/scripts/w/fasfield/ovs_directory_search.asp.

The U.S. Department of Commerce at the U.S. Mission to the EU has written a report on how to export seafood to the EU. Given the complexity of the EU legislation, this report provides an overview of key E.U. Legislation governing trade in fish products. For more information, contact Stephane Vrignaud at:

Tel: +322-508-2842

Fax: +322-513-1228

Stephane.vrignaud@mail.doc.gov

Please find below an overview of the Fishery Products reports from FAS posts within the EU as of January 2007. These and other reports, such as FAIRS, Exporter Guides, HRI and Food Retail reports, can be downloaded from the following FAS website:

<http://www.fas.usda.gov/scripts/attacherep/default.asp>

| Country | Title | Date Report | Number |
|----------------|--|-------------|--------|
| EU | Annual Report | 03/28/2008 | E48029 |
| Sweden | Sweden imposes new legislation to stop overfishing | 02/15/2008 | SW8001 |
| Norway | Annual | 10/16/2007 | NO7006 |
| Bulgaria | Bulgarian Fish Imports Update | 08/20/2007 | BU7008 |
| Poland | Update | 06/28/2007 | PL7035 |
| Czech Republic | Fish and Seafood Market Brief | 04/26/2007 | EZ7004 |
| EU | Annual Report | 01/30/2007 | E47006 |
| Spain | Report | 01/11/2007 | SP6037 |
| Italy | Report | 10/24/2006 | IT6040 |
| Portugal | Annual | 10/24/2006 | PO6013 |
| Denmark | Annual | 10/11/2006 | DA6011 |
| France | Annual | 10/11/2006 | FR6054 |
| Norway | Annual | 10/06/2006 | NO6007 |
| Germany | Fishery Products | 10/03/2006 | GM6037 |
| United Kingdom | Annual | 09/27/2006 | UK6032 |
| Italy | Annual | 04/18/2006 | IT6021 |
| EU | Annual Report | 02/01/2006 | E36013 |
| Norway | Hard Times for Norwegian Salmon | 01/24/2006 | NO6001 |

Appendix 1: Volume, Fish Catch, EU countries, 1,000 MT

| | 2002 | 2003 | 2004 | 2005 | 2006* | 2007** |
|-------------------|-------|-------|-------|-------|-------|--------|
| 1 Austria | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 Belgium | 29 | 27 | 27 | 25 | 23 | 22 |
| 3 Bulgaria | 15 | 12 | 8 | 5 | 8 | 10 |
| 4 Cyprus | 2 | 2 | 2 | 2 | 2 | 2 |
| 5 Czech Republic | 5 | 5 | 5 | 4 | 5 | 4 |
| 6 Denmark | 1,442 | 1,031 | 1,090 | 911 | 868 | 850 |
| 7 Estonia | 101 | 79 | 88 | 100 | 87 | 90 |
| 8 Finland | 146 | 122 | 135 | 132 | 146 | 140 |
| 9 France | 704 | 709 | 671 | 595 | 583 | 575 |
| 10 Germany | 224 | 261 | 262 | 286 | 279 | 285 |
| 11 Greece | 96 | 93 | 93 | 92 | 97 | 95 |
| 12 Hungary | 7 | 7 | 7 | 8 | 8 | 8 |
| 13 Ireland | 282 | 266 | 280 | 262 | 211 | 200 |
| 14 Italy | 270 | 296 | 279 | 298 | 312 | 310 |
| 15 Latvia | 114 | 115 | 125 | 151 | 140 | 135 |
| 16 Lithuania | 150 | 157 | 162 | 140 | 153 | 150 |
| 17 Luxembourg | 0 | 0 | 0 | 0 | 0 | 0 |
| 18 Malta | 1 | 1 | 1 | 1 | 1 | 1 |
| 19 Netherlands | 464 | 526 | 522 | 549 | 433 | 475 |
| 20 Poland | 223 | 180 | 192 | 156 | 123 | 115 |
| 21 Portugal | 202 | 209 | 221 | 212 | 229 | 215 |
| 22 Romania | 7 | 10 | 5 | 6 | 7 | 6 |
| 23 Slovakia | 2 | 2 | 2 | 2 | 2 | 2 |
| 24 Slovenia | 2 | 1 | 1 | 1 | 1 | 1 |
| 25 Spain | 865 | 866 | 770 | 768 | 711 | 700 |
| 26 Sweden | 295 | 287 | 270 | 256 | 269 | 270 |
| 27 United Kingdom | 690 | 637 | 655 | 669 | 616 | 600 |
| | 6,338 | 5,901 | 5,873 | 5,631 | 5,314 | 5,261 |

Source: Eurostat, *provisional data, **FAS/The Hague estimates

Appendix 2: Volume, Aquaculture, EU countries, 1,000 MT

| | 2002 | 2003 | 2004 | 2005 | 2006* | 2007** |
|-------------------|-------|-------|-------|-------|-------|--------|
| 1 Austria | 2 | 2 | 2 | 2 | 3 | 2 |
| 2 Belgium | 2 | 1 | 1 | 1 | 1 | 1 |
| 3 Bulgaria | 2 | 4 | 2 | 3 | 3 | 3 |
| 4 Cyprus | 2 | 2 | 2 | 2 | 4 | 3 |
| 5 Czech Republic | 19 | 20 | 19 | 20 | 20 | 19 |
| 6 Denmark | 32 | 38 | 43 | 39 | 28 | 25 |
| 7 Estonia | 0 | 0 | 0 | 1 | 1 | 1 |
| 8 Finland | 15 | 13 | 13 | 14 | 13 | 13 |
| 9 France | 252 | 240 | 261 | 258 | 258 | 258 |
| 10 Germany | 50 | 74 | 57 | 45 | 38 | 36 |
| 11 Greece | 88 | 101 | 97 | 106 | 113 | 115 |
| 12 Hungary | 12 | 12 | 13 | 14 | 15 | 14 |
| 13 Ireland | 63 | 63 | 58 | 60 | 53 | 57 |
| 14 Italy | 184 | 192 | 118 | 181 | 174 | 175 |
| 15 Latvia | 0 | 1 | 1 | 1 | 1 | 1 |
| 16 Lithuania | 2 | 2 | 3 | 2 | 2 | 2 |
| 17 Luxembourg | | | | | | |
| 18 Malta | 1 | 1 | 1 | 1 | 7 | 5 |
| 19 Netherlands | 54 | 67 | 76 | 68 | 41 | 40 |
| 20 Poland | 33 | 35 | 35 | 37 | 36 | 36 |
| 21 Portugal | 8 | 8 | 7 | 6 | 7 | 7 |
| 22 Romania | 9 | 9 | 8 | 7 | 9 | 8 |
| 23 Slovakia | 1 | 1 | 1 | 1 | 1 | 1 |
| 24 Slovenia | 1 | 1 | 2 | 2 | 1 | 1 |
| 25 Spain | 259 | 273 | 299 | 222 | 295 | 280 |
| 26 Sweden | 6 | 6 | 6 | 6 | 8 | 7 |
| 27 United Kingdom | 179 | 182 | 207 | 173 | 172 | 185 |
| | 1,274 | 1,346 | 1,330 | 1,270 | 1,301 | 1,293 |

Source: Eurostat, *provisional data, **FAS/The Hague estimates

Appendix 3: Consumption, EU member states, kilogram per capita

| | 2005 |
|--------------------|------|
| Austria | 11 |
| Belgium/Luxembourg | 22 |
| Bulgaria | 5 |
| Cyprus | 25 |
| Czech Republic | 10 |
| Denmark | 24 |
| Estonia | 14 |
| Finland | 34 |
| France | 32 |
| Germany | 15 |
| Greece | 26 |
| Hungary | 5 |
| Ireland | 21 |
| Italy | 24 |
| Latvia | 37 |
| Lithuania | 17 |
| Malta | 30 |
| Netherlands | 15 |
| Poland | 12 |
| Portugal | 60 |
| Romania | 3 |
| Slovakia | 6 |
| Slovenia | 7 |
| Spain | 40 |
| Sweden | 28 |
| United Kingdom | 24 |
| EU-27 | 22 |

Source: FAO, 2007

Appendix 4: EU imports, top 15 third countries, MT, 2002-2007

| | 2002 | 2003 | 2004 | 2005 | 2006 | 2007* |
|------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| World | 7,475,669 | 7,905,520 | 7,988,563 | 9,094,682 | 8,706,096 | 8,897,330 |
| EU 27 | 3,443,323 | 3,578,532 | 3,662,392 | 4,564,619 | 3,793,442 | 3,870,099 |
| 1 Norway | 701,796 | 756,598 | 735,552 | 735,788 | 794,312 | 833,058 |
| 2 China | 141,763 | 229,004 | 272,364 | 348,961 | 448,667 | 481,382 |
| 3 Iceland | 236,557 | 248,172 | 279,170 | 264,202 | 275,605 | 257,541 |
| 4 United States | 231,859 | 215,657 | 267,378 | 254,938 | 256,677 | 275,328 |
| 5 Argentina | 202,950 | 231,335 | 191,039 | 173,009 | 251,242 | 231,923 |
| 6 Thailand | 147,933 | 168,189 | 159,139 | 177,916 | 214,733 | 227,193 |
| 7 Vietnam | 32,037 | 45,936 | 66,882 | 105,831 | 194,862 | 256,204 |
| 8 Morocco | 175,923 | 169,189 | 152,939 | 180,162 | 191,748 | 180,276 |
| 9 Ecuador | 76,759 | 98,813 | 106,173 | 136,731 | 157,210 | 175,154 |
| 10 India | 95,407 | 109,418 | 109,343 | 123,286 | 142,759 | 146,609 |
| 11 Russia | 209,995 | 172,211 | 146,540 | 126,212 | 133,732 | 102,664 |
| 12 Chile | 93,434 | 94,906 | 103,073 | 122,392 | 128,973 | 135,024 |
| 13 Greenland | 94,191 | 100,494 | 106,112 | 113,517 | 117,606 | 112,716 |
| 14 Faroe Islands | 139,677 | 143,637 | 126,037 | 119,571 | 102,362 | 94,347 |
| 15 Peru | 60,695 | 61,323 | 77,718 | 89,019 | 101,816 | 121,077 |
| Other | 1,391,370 | 1,482,106 | 1,426,712 | 1,458,528 | 1,400,350 | 1,396,737 |
| Total | 4,032,346 | 4,326,988 | 4,326,171 | 4,530,063 | 4,912,654 | 5,027,232 |

Source: Global Trade Atlas, *FAS/The Hague estimates

Appendix 5: EU imports, top 15 third countries, USD, 2002-2007

| | 2002 | 2003 | 2004 | 2005 | 2006 | 2007* |
|------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| World | 22,090,191,946 | 26,247,757,907 | 28,946,284,283 | 32,114,709,334 | 36,504,812,775 | 40,500,117,904 |
| EU 27 | 10,281,507,092 | 12,201,703,185 | 13,802,972,627 | 15,052,891,678 | 16,575,773,402 | 18,323,321,836 |
| 1 Norway | 1,955,583,751 | 2,205,914,855 | 2,455,878,781 | 2,872,099,262 | 3,479,087,594 | 3,810,126,897 |
| 2 China | 329,311,377 | 572,646,765 | 727,695,290 | 1,078,166,250 | 1,469,168,566 | 1,719,266,762 |
| 3 Iceland | 869,026,632 | 1,010,415,034 | 1,167,904,124 | 1,235,344,041 | 1,356,399,408 | 1,496,493,482 |
| 4 United States | 624,036,760 | 611,821,107 | 759,571,496 | 843,414,683 | 979,033,645 | 1,160,754,753 |
| 5 Morocco | 616,734,909 | 727,701,285 | 704,170,092 | 823,085,611 | 920,570,954 | 988,702,600 |
| 6 Argentina | 517,110,616 | 730,536,320 | 614,534,010 | 506,242,523 | 845,790,255 | 772,238,861 |
| 7 Thailand | 367,178,675 | 418,794,659 | 454,700,517 | 537,296,103 | 700,396,746 | 884,531,220 |
| 8 Vietnam | 95,619,090 | 150,090,515 | 235,432,660 | 394,604,578 | 685,748,627 | 893,915,730 |
| 9 Ecuador | 238,694,397 | 315,721,838 | 362,407,612 | 506,001,366 | 645,069,943 | 763,997,351 |
| 10 Chile | 285,433,534 | 319,528,418 | 400,009,767 | 522,873,028 | 621,288,281 | 692,674,455 |
| 11 India | 291,021,674 | 392,400,394 | 394,858,844 | 455,354,568 | 590,446,650 | 678,672,460 |
| 12 Russia | 495,764,113 | 449,267,738 | 399,949,300 | 433,540,221 | 540,768,181 | 500,703,583 |
| 13 Canada | 302,995,586 | 371,121,865 | 414,979,639 | 450,337,570 | 481,664,317 | 585,326,832 |
| 14 Faroe Islands | 411,081,768 | 463,994,613 | 456,163,695 | 418,088,956 | 419,378,331 | 458,021,683 |
| 15 Greenland | 256,300,110 | 296,552,107 | 320,402,603 | 340,114,479 | 351,352,165 | 382,033,125 |
| Other | 4,152,791,862 | 5,009,547,209 | 5,274,653,226 | 5,645,254,417 | 5,842,875,710 | 6,389,336,274 |
| Total | 11,808,684,854 | 14,046,054,722 | 15,143,311,656 | 17,061,817,656 | 19,929,039,373 | 22,176,796,068 |

Source: Global Trade Atlas, *FAS/The Hague

Appendix 6: EU imports, top 10 commodities, MT, 2002-2007

| Code | Commodity | 2002 | 2003 | 2004 | 2005 | 2006 | 2007* |
|-----------|--|-----------|-----------|-----------|-----------|-----------|-----------|
| 1 030420 | Fish Fillets, Frozen | 704,218 | 762,140 | 791,112 | 848,607 | 974,075 | 1,046,092 |
| 2 030613 | Shrimps And Prawns, Including In Shell, Frozen | 342,074 | 407,658 | 399,801 | 430,273 | 487,050 | 498,041 |
| 3 160414 | Tunas/Skipjack/Bonito Prep/Pres Not Minced | 391,331 | 432,904 | 427,165 | 459,393 | 474,459 | 482,175 |
| 4 030212 | Salmon, Pac, Atl & Danube, With Bones, Fr Or Chill | 255,955 | 299,351 | 306,654 | 325,005 | 341,798 | 405,278 |
| 5 030749 | Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine | 241,985 | 273,791 | 281,340 | 301,150 | 282,667 | 271,158 |
| 6 030799 | Molluscs Etc Nesoi, Frozen, Dri, Salted Or In Brin | 110,304 | 115,241 | 111,481 | 137,553 | 200,119 | 184,349 |
| 7 030490 | Fish Meat Nesoi, Exc Fish Steaks & Fillets, Froz | 156,890 | 161,279 | 176,889 | 162,316 | 191,606 | 187,839 |
| 8 030379 | Fish, Nesoi, With Bones, Frozen | 158,898 | 163,738 | 155,097 | 150,402 | 186,958 | 155,845 |
| 9 030269 | Fish, Nesoi, With Bones, Fresh Or Chilled | 138,538 | 141,812 | 154,693 | 160,412 | 155,045 | 147,918 |
| 10 030410 | Fish Fillets & Oth Meat Ex Fish Steaks Fresh/Child | 73,708 | 88,438 | 113,743 | 122,122 | 115,645 | 126,052 |
| | Other | 1,458,445 | 1,480,636 | 1,408,196 | 1,432,830 | 1,503,232 | 1,522,485 |
| | Total imports from 3rd countries | 4,032,346 | 4,326,988 | 4,326,171 | 4,530,063 | 4,912,654 | 5,027,232 |

Source: Global Trade Atlas, *FAS/The Hague

Appendix 7: EU imports from the U.S., top 15 commodities, MT, 2002-2007

| | 2002 | 2003 | 2004 | 2005 | 2006 | 2007* |
|--|---------|---------|---------|---------|---------|---------|
| 1 030420 Fish Fillets, Frozen | 90,695 | 67,363 | 102,502 | 103,258 | 90,784 | 120,085 |
| 2 030490 Fish Meat Nesoi, Exc Fish Steaks & Fillets, Froz | 32,979 | 32,712 | 36,616 | 31,932 | 30,356 | 30,518 |
| 3 030360 Cod Except Fillets, Livers And Roes, Frozen | 12,052 | 16,295 | 18,146 | 24,814 | 28,099 | 34,307 |
| 4 030374 Mackerel Except Fillets, Livers And Roes, Frozen | 4,383 | 15,386 | 21,466 | 14,402 | 20,084 | 7,018 |
| 5 160411 Salmon, Prepared Or Preserved, Whole Or Pieces | 23,199 | 17,257 | 22,513 | 18,368 | 16,711 | 15,877 |
| 6 030319 Pacific Salmon, Nesoi, Excl Filet, Liver,Roe, Froz | 14,486 | 15,444 | 15,602 | 14,891 | 16,605 | 13,324 |
| 7 030749 Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine | 12,141 | 7,683 | 10,086 | 9,791 | 9,999 | 7,111 |
| 8 030622 Lobsters, Live, Fresh,Ch, Dried, Saltd Or In Brine | 6,383 | 6,380 | 7,040 | 7,274 | 8,456 | 8,269 |
| 9 030379 Fish, Nesoi, With Bones, Frozen | 4,219 | 3,387 | 3,544 | 3,308 | 6,438 | 10,564 |
| 10 030729 Scallops Incl Queen, Frozen/Dried/Salted/In Brine | 2,343 | 2,389 | 3,363 | 4,526 | 5,362 | 2,918 |
| 11 030311 Sockeye Salmon, Excl Fillet, Livers & Roes, Frozen | 2,774 | 2,371 | 2,221 | 2,086 | 4,934 | 6,552 |
| 12 030721 Scallops Incl Queen Scallops, Live, Fresh, Chilled | 240 | 394 | 866 | 1,128 | 2,157 | 2,807 |
| 13 030269 Fish, Nesoi, With Bones, Fresh Or Chilled | 2,651 | 3,073 | 2,864 | 3,599 | 2,132 | 1,750 |
| 14 030562 Cod, Salted Or In Brine, Not Dried Or Smoked | 3,665 | 3,874 | 5,152 | 2,965 | 2,123 | 2,152 |
| 15 030378 Whiting & Hake, Except Fillets, Liver, Roe, Frozen | 933 | 416 | 392 | 513 | 1,479 | 1,243 |
| Other | 18,716 | 21,233 | 15,005 | 12,083 | 10,958 | 10,833 |
| Total | 231,859 | 215,657 | 267,378 | 254,938 | 256,677 | 275,328 |

Source: Global Trade Atlas, *FAS/The Hague